A2500-2

# Paper Paperboard & Wood Pulp

MONTHLY STATISTICAL SUMMARY - Vol. 63 - No. 1 JANUARY 1985

## PAPER AND PAPERBOARD PRODUCTION: 1984

The rate of paper and paperboard production in December 1984 maintained the pace of October and November production. The trend rate (average of the November and December seasonally adjusted rates) was 68.2 million tons per year, a shade above the trend rate of the previous month. This brought total 1984 production to a record-high 68.8 million tons, 5.8% above the 1983 high.

The stability in the trend of total production, however, reflected somewhat diverse movements between paper and paperboard production. The rate of paper production eased in December, while paperboard output gained a little. For 1984 as a whole, both paper and paperboard production moved to new highs. Paper, at 34.4 million tons, was 4.8% above its 1983 high, while paperboard, at 34.4 million tons, gained 6.8%.

The stronger gain in paperboard production relative to that of paper was consistent with recent trends. Paperboard demand, which is strongly influenced by industrial production, had fallen sharply in 1982 and moved up strongly in 1983 and 1984. Paper production, somewhat less affected by the 1982 recession, showed more modest gains in 1983 and 1984.

PAPER: The easing in the paper production trend was centered on printing papers. In the uncoated free sheet grades, for example, new orders were below the rate of shipments throughout 1984, and the backlog of unfilled orders moved down to less than one-half of the total outstanding at the end of 1983.

Nonetheless, where total new orders for uncoated free sheet papers in 1984 were 2.6% below the 1983 total, 1984 shipments, at 9.2 million tons, were 4.4% above their 1983 high. The major gains in this grade were in form bond papers (largely computer printout papers) as well as in commercial printing and book publishing papers.

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Demand for coated papers remained strong throughout 1984, with total production for the year reaching a record 6.2 million tons. This high output reflected intense demand in all its major markets: magazines, other periodicals, commercial printing and book publishing. The production total was 9.2% above its 1983 high, equivalent to about 97% of the total capacity as reported in the API's recent Survey of Paper and Paperboard Capacity. The uncoated free sheet total was equivalent to 90.7% of reported capacity.

Although the production of total printing and writing papers did show some easing in the closing months of 1984, the total for the year was 18.4 million tons, 5.8% above the 1983 high.

Production of packaging and industrial papers held up well in December. The 1984 production total for the unbleached kraft paper grades was 3.7 million tons, about equal to its year-ago total. Production of the other packaging and industrial grades amounted to 1.9 million tons, 2.9% above its 1983 total.

PAPERBOARD: The gains in paperboard production in December were shared by all the major grades. For example, the trend rate of kraft paperboard production rose strongly above that of the preceding months. Total production of kraft paperboard in 1984 was 17.2 million tons, 6.9% above its 1983 high. The 1984 production total was equivalent to 96.6% of the capacity reported in the API's recent Capacity Survey.

Production of semichemical paperboard production -- the other major grade of containerboard -- amounted to 5.2 million tons, 9.1% over its 1983 high.

Production for export of both kraft and semichemical paperboard declined in 1984. At 2.0 million tons, kraft paperboard production for export was about 13% below its 1983 level. Exports of semichemical paperboard, at 151,000 tons, fell by 21%.

Exports of solid bleached paperboard also declined in 1984; at 470,000 tons the total was 9% below its 1983 level. Even with this decline, the production of solid bleached paperboard moved to a new high of 4.1 million tons in 1984, gaining 3.4% over its 1983 level. This was the first year that production of these grades moved above 4 million tons, but that was still only a little higher than the 1976-1981 rates of production. In those years production fluctuated in a relatively narrow range: the low point was 1977's 3,721,000 tons; the high 1979's 3,998,000 tons. This stability largely reflected the net effect of two divergent trends: production of milk carton stock in a slight downtrend offset by strength in the production of bleached kraft folding boxboard.

In 1984 production of milk carton stock for domestic use showed a 6% gain, reaching its highest level since 1980. Bleached kraft folding boxboard for domestic use also gained about 8%, reaching a new high. The gain in S.B.S. folding boxboard reflected the strong demand for total folding boxboard.

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## PAPER AND PAPERBOARD STATISTICS

### PRODUCTION, SHIPMENTS AND ORDERS
(Thousands of Tons)

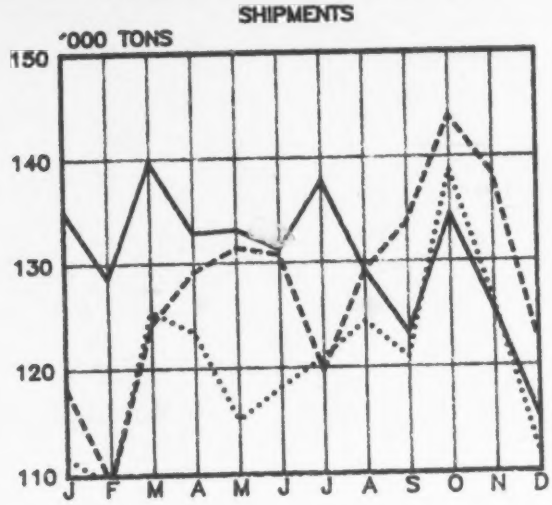
| | YEAR 1982 | YEAR 1983 | SEPT 1984 | OCT. 1984 | NOV. 1984 | DEC. 1984 | Annual Rate Y-T-D 1984 | % Change From same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| **PAPER** | | | | | R | P | | |
| Newsprint - Production | 5042 | 5167 | 457 | 474 | 460 | 428 | 5543 | 7.3 |
| - Shipments | 4988 | 5153 | 451 | 488 | 466 | 431 | 5584 | 8.4 |
| Printing & Writing | 15811 | 17387 | 1465 | 1624 | 1512 | 1418 | 18397 | 5.8 |
| Groundwood Paper - Shipments | 1471 | 1531 | 123 | 135 | 126 | 115 | 1568 | 2.3 |
| - New Orders | 1481 | 1581 | 123 | 138 | 112 | 124 | 1591 | 0.6 |
| - Unfilled Orders | 92 | 145 | 168 | 171 | 158 | 168 | 168 | 16.7 |
| Coated Paper - Shipments | 4974 | 5696 | 496 | 553 | 527 | 486 | 6221 | 8.2 |
| - New Orders | 4941 | 5864 | 478 | 537 | 524 | 483 | 6179 | 5.4 |
| - Unfilled Orders | 322 | 513 | 482 | 455 | 452 | 450 | 450 | -12.3 |
| Unctd Free Sheet - Shipments | 7855 | 8787 | 727 | 804 | 747 | 685 | 9150 | 4.4 |
| - New Orders | 7827 | 8078 | 712 | 795 | 730 | 686 | 8844 | -2.6 |
| - Unfilled Orders | 321 | 687 | 395 | 387 | 370 | 372 | 372 | -45.7 |
| Thin Paper - Shipments | 329 | 328 | 27 | 30 | 26 | 25 | 338 | 3.0 |
| Cotton Fiber Paper - Shipments | 120 | 131 | 12 | 13 | 11 | 10 | 140 | 6.9 |
| Bleached Bristols - Production | 862 | 934 | 81 | 91 | 76 | 75 | 983 | 5.2 |
| Tissue Paper - Production | 4438 | 4789 | 413 | 434 | 420 | 420 | 4821 | 2.8 |
| Total Packaging & Other Paper | 5300 | 5498 | 451 | 468 | 428 | 386 | 5551 | 1.0 |
| Unbl. Kraft Paper - Shipments | 3688 | 3666 | 302 | 313 | 289 | 255 | 3666 | 0.0 |
| Other Paper - Production | 1612 | 1632 | 150 | 154 | 139 | 131 | 1606 | 2.8 |
| TOTAL PAPER-Production-UnadJ. * | 30380 | 32841 | 2786 | 2999 | 2820 | 2653 | 34412 | 4.8 |
| -Production-S.A. * | | | 2905 | 2888 | 2840 | 2837 | 34367 | 4.5 |
| **PAPERBOARD - PRODUCTION** | | | | | | | | |
| Solid Wood Pulp Furnish | 22589 | 24778 | 2222 | 2234 | 2128 | 1928 | 26401 | 6.5 |
| Unbl. Kraft Linerboard (1) | 13494 | 15001 | 1375 | 1349 | 1308 | 1154 | 16032 | 6.9 |
| Production for Export | 1931 | 2281 | 174 | 131 | 112 | 128 | 1975 | -13.4 |
| Other Unbl. Kraft Paperboard | 1040 | 1121 | 83 | 98 | 82 | 77 | 1147 | 2.3 |
| Semichemical Paperboard | 4389 | 4730 | 435 | 439 | 411 | 392 | 5162 | 9.1 |
| Production for Export | 185 | 193 | 14 | 10 | 16 | 11 | 151 | -21.4 |
| Solid Bleached Paperboard | 3665 | 3826 | 330 | 346 | 326 | 305 | 4059 | 3.4 |
| Production for Export | 525 | 514 | 38 | 39 | 37 | 37 | 470 | -8.7 |
| Recycled Paperboard | 6476 | 7398 | 661 | 743 | 634 | 575 | 7871 | 7.7 |
| Production for Export | 13 | 24 | 2 | 2 | 2 | 4 | 21 | -15.4 |
| TOTAL PAPERBOARD-Prod.-UnadJ. * | 28065 | 32177 | 2883 | 2977 | 2782 | 2503 | 34372 | 6.8 |
| - Containerboard Prod.(Dom. Use) | 17508 | 18173 | 1786 | 1798 | 1730 | 1538 | 20830 | 9.2 |
| - Boxboard Prod.(Dom. Use) (2) | 5150 | 5551 | 515 | 575 | 491 | 441 | 6004 | 8.2 |
| - All Other P'bd Prod.(D.U.) (2) | 3753 | 4387 | 374 | 422 | 375 | 345 | 4821 | 9.7 |
| - Total Paperbd Prod. for Export | 2654 | 3012 | 229 | 182 | 166 | 178 | 2617 | -13.1 |
| TOTAL PAPERBOARD PROD.- S.A. * | | | 3032 | 2857 | 2767 | 2927 | 34364 | 6.5 |
| **TOTAL PAPER AND PAPERBOARD** | | | | | | | | |
| Production - actual * | 58456 | 65017 | 5668 | 5876 | 5582 | 5155 | 68784 | 5.8 |
| Production - S.A. * | | | 5937 | 5746 | 5607 | 5764 | 68731 | 5.5 |

(1)Includes all exports of kraft paperboard.
(2)Data for unbl. kraft folding boxboard incl. in All Other P'bd.
* NOTE: Year 1984 contains one more day than year 1983.

P Preliminary
R Revised
S.A. Seasonally Adjusted

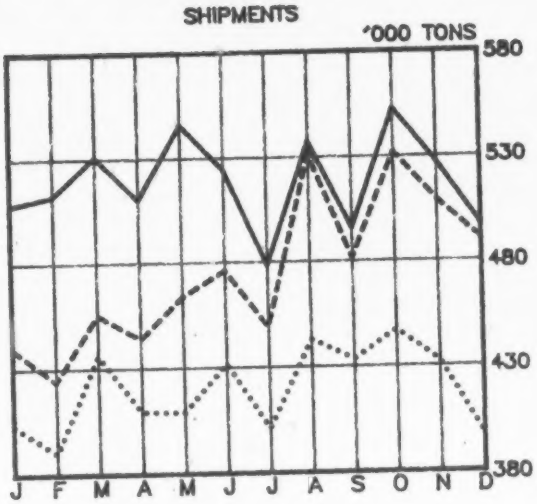
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



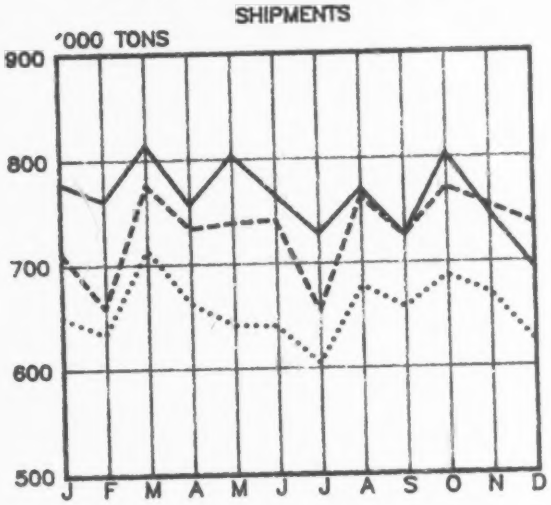

COATED PAPER

SHIPMENTS



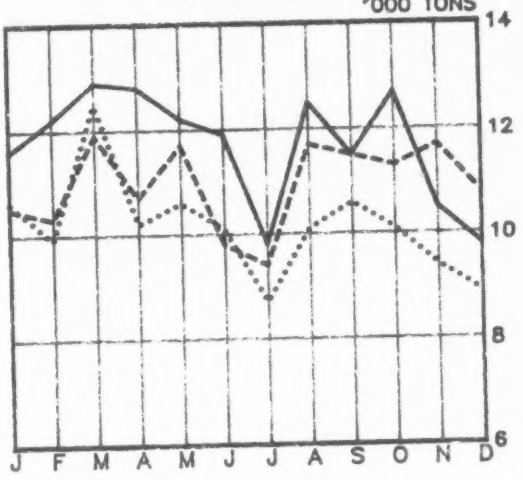

UNCOATED FREE SHEET PAPERS

SHIPMENTS



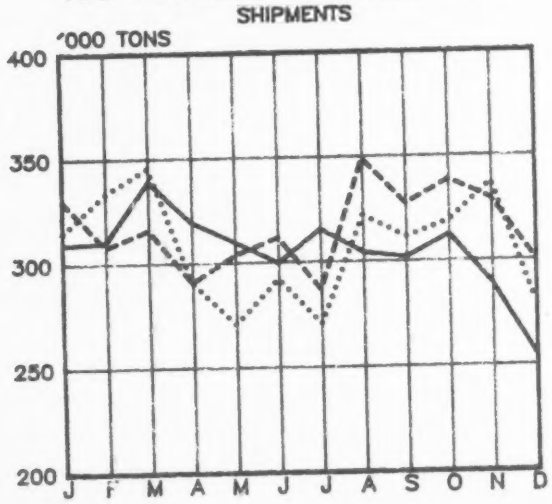

COTTON FIBER PAPER

SHIPMENTS



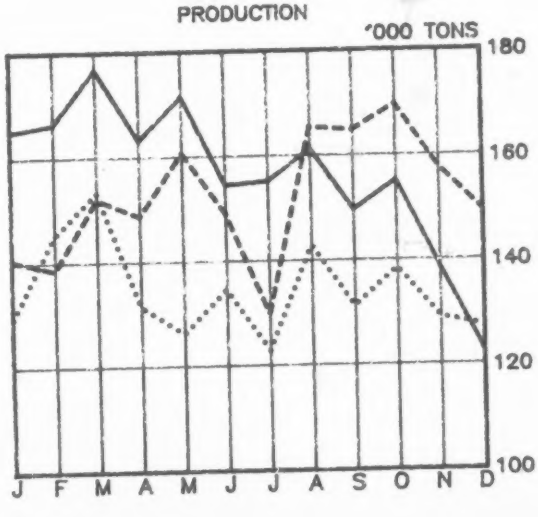

UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS




OTHER PAPER

PRODUCTION




1982 ····· 1983 - - - - - 1984 ——

# WOOD PULP STATISTICS
(Thousands of Tons)

| | YEAR 1982 | YEAR 1983 | AUG. 1984 | SEPT 1984 | OCT. 1984 | NOV. 1984 | Annual Rate Y-T-D 1984 | % Change From same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| TOTAL WOOD PULP | | | | | R | P | | |
| Total Wood Pulp - Production | 49334 | 52537 | 4781 | 4559 | 4763 | 4502 | 55857 | 5.8 |
| - Imports | 3656 | 4083 | 389 | 388 | 344 | 415 | 4445 | 8.7 |
| - Exports | 3395 | 3644 | 318 | 285 | 284 | 274 | 3581 | 0.7 |
| - New Supply | 49595 | 52986 | 4862 | 4660 | 4823 | 4843 | 56721 | 6.3 |
| Dissolving Pulp - Production | 1092 | 1261 | 109 | 73 | 103 | 101 | 1221 | -3.0 |
| - Imports | 186 | 192 | 9 | 23 | 9 | 8 | 158 | -16.8 |
| - Exports | 631 | 647 | 43 | 49 | 48 | 28 | 578 | -7.7 |
| - New Supply | 647 | 806 | 74 | 47 | 64 | 81 | 799 | -2.6 |
| Paper Grades - Production | 39478 | 42358 | 3891 | 3703 | 3846 | 3646 | 45013 | 5.6 |
| Chemical Pulp - Imports | 3302 | 3706 | 355 | 330 | 323 | 359 | 3995 | 7.6 |
| - Exports | 2736 | 2958 | 272 | 232 | 232 | 241 | 2948 | 2.0 |
| - New Supply | 40044 | 43106 | 3974 | 3800 | 3938 | 3764 | 46060 | 6.0 |
| Groundwood and - Production | 5064 | 5067 | 461 | 458 | 460 | 436 | 5562 | 9.7 |
| Thermo-Mech. - Imports | 167 | 195 | 26 | 33 | 11 | 48 | 294 | 53.9 |
| - Exports | 27 | 40 | 3 | 4 | 4 | 4 | 54 | 32.7 |
| - New Supply | 5204 | 5222 | 483 | 487 | 467 | 480 | 5802 | 11.1 |
| Semi-Chemical - Production | 3699 | 3851 | 330 | 326 | 353 | 318 | 4080 | 4.8 |
| - Imports | 0 | 0 | | | | | | |
| - Exports | 0 | 0 | ------ | Included | with | Groundwood | Pulp | ------ |
| - New Supply | 3699 | 3851 | 330 | 326 | 353 | 318 | 4060 | 4.8 |
| MARKET WOOD PULP | | | | | | | | |
| Total Market - Production | 5732 | 6478 | 593 | 546 | 635 | 579 | 6872 | 5.0 |
| Wood Pulp - Imports | 2443 | 2845 | 273 | 273 | 250 | 283 | 3213 | 11.1 |
| - Exports | 3143 | 3421 | 290 | 311 | 247 | 248 | 3433 | 1.3 |
| - New Supply | 5031 | 6002 | 575 | 507 | 639 | 613 | 6652 | 10.0 |
| Dissolving Pulp - Production | 1089 | 1260 | 108 | 73 | 103 | 101 | 1220 | -3.2 |
| - Imports | 194 | 210 | 9 | 28 | 13 | 11 | 200 | -1.9 |
| - Exports | 675 | 698 | 50 | 67 | 42 | 52 | 679 | 0.4 |
| - New Supply | 608 | 772 | 67 | 34 | 74 | 60 | 741 | -5.9 |
| Paper Grades - Production | 4643 | 5208 | 483 | 472 | 531 | 476 | 5839 | 7.0 |
| Chemical Pulp - Imports | 2202 | 2698 | 260 | 241 | 229 | 248 | 2825 | 10.3 |
| - Exports | 2488 | 2723 | 240 | 245 | 205 | 197 | 2755 | 1.6 |
| - New Supply | 4377 | 5181 | 503 | 468 | 555 | 527 | 5809 | 11.5 |
| Groundwood Pulp - Production | 1 | 12 | 1 | 1 | 1 | 2 | 14 | 19.8 |
| and All Other - Imports | 46 | 38 | 4 | 4 | 8 | 24 | 89 | 137.6 |
| - Exports | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.0 |
| - New Supply | 47 | 49 | 5 | 5 | 9 | 26 | 103 | 110.3 |

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports - Department of Commerce.

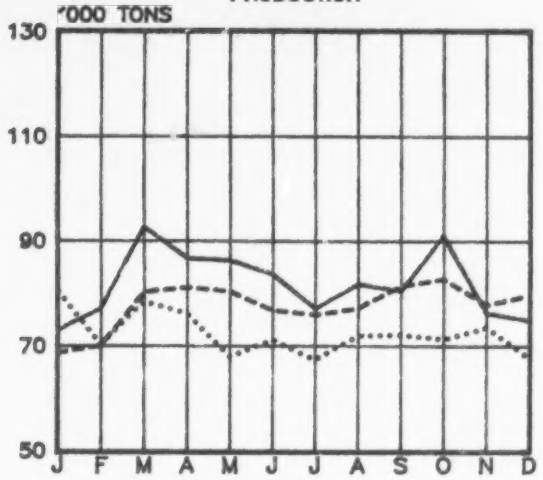
# FIBROUS RAW MATERIALS
(Thousands of tons)

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| CONSUMPTION AT PAPER & PAPERBOARD MILLS | | | | | R | P | | |
| Total | 61332 | 65517 | 6041 | 5743 | 5971 | 5716 | 70309 | 6.9 |
| Total Wood Pulp | 47767 | 50978 | 4694 | 4485 | 4604 | 4406 | 54463 | 6.5 |
| Waste Paper | 13565 | 14539 | 1347 | 1259 | 1367 | 1310 | 15847 | 8.5 |
| INVENTORIES | | | | | | | | |
| Own Use Wood Pulp at Pulp Mills | 177 | 170 | 159 | 163 | 164 | 159 | 159 | -15.7 |
| Market Pulp at Pulp Mills | 437 | 384 | 409 | 415 | 500 | 588 | 588 | 20.4 |
| Mkt Pulp at Pap. & Bd. Mills * | 429 | 504 | 506 | 508 | 474 | 470 | 470 | -1.1 |
| Waste Paper at Paper &Bd. Mills | 1022 | 920 | 955 | 931 | 976 | 992 | 992 | 14.8 |
| Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp | 37 | 26 | 29 | 30 | 34 | 42 | 42 | 23.5 |

SOURCES: Wood Pulp Data, Pulp Division, Pulp, Materials and Technology Group, API. Waste Paper Data, Paper Recycling Committee, API.
* - Census data prior to 1982; P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons

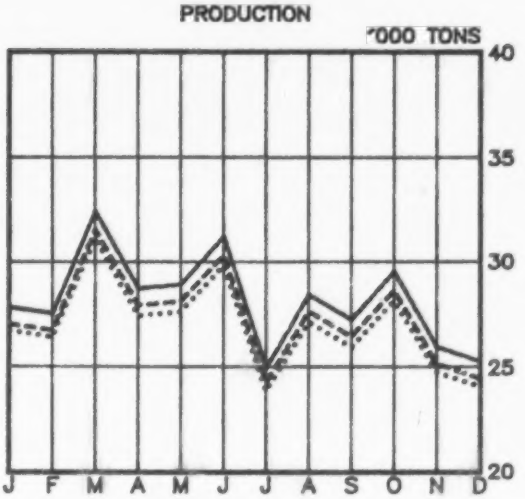
BLEACHED BRISTOLS

PRODUCTION



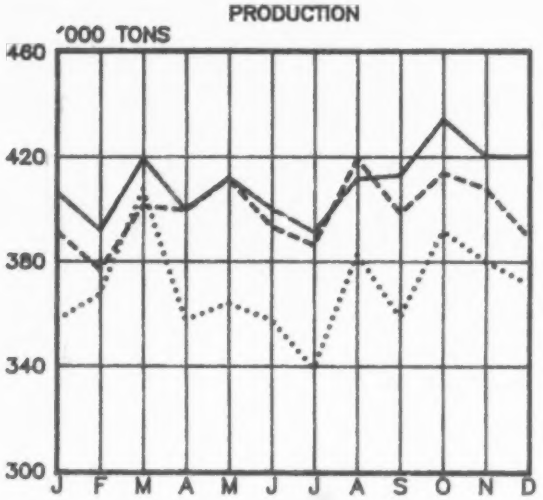

THIN PAPER

PRODUCTION



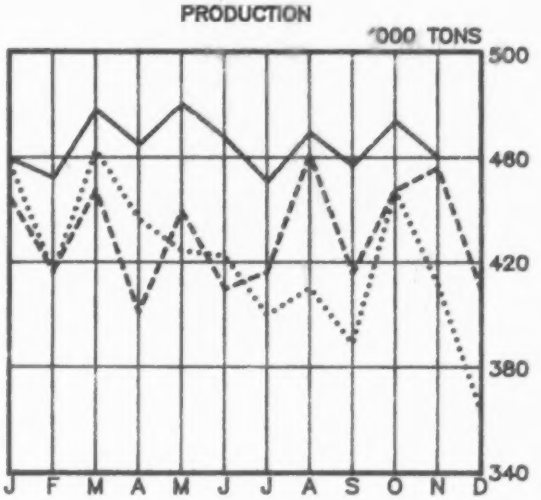

TISSUE PAPER

PRODUCTION



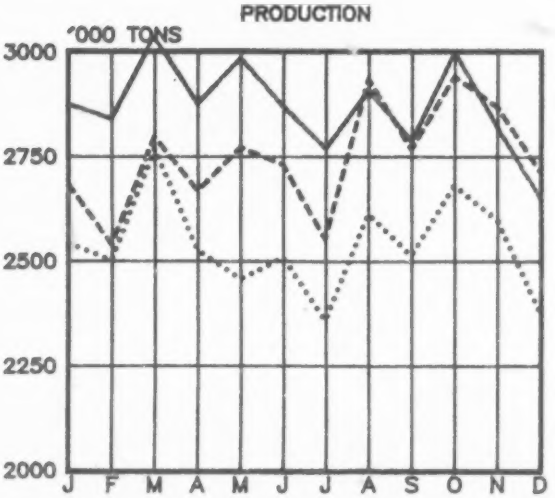

NEWSPRINT

PRODUCTION



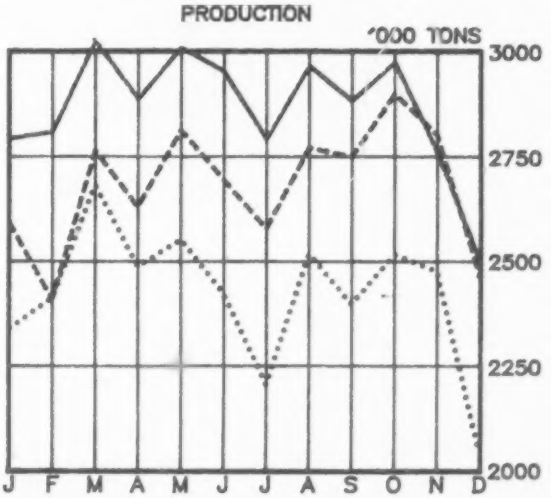

TOTAL PAPER

PRODUCTION




TOTAL PAPERBOARD

PRODUCTION




1982 ····· 1983 - - - - - 1984 ——

## FIBROUS RAW MATERIALS (Continued)
(Thousands of Standard (128 cubic Foot) Cords)

| | | YEAR 1982 | YEAR 1983 | JULY 1984 | AUG. 1984 | SEPT 1984 | OCT. 1984 | Annual Rate Y-T-D 1984 | % Change From same Period Last Year |
|---|---|---|---|---|---|---|---|---|---|
| PULPWOOD | | | | | | | | | |
| Total U.S. | - Total Receipts | 78519 | 84475 | 7197 | 7642 | 7398 | 7871 | 88104 | 5.2 |
| | - Total Consumpt. | 79039 | 85442 | 7192 | 7368 | 7246 | 7625 | 88342 | 3.1 |
| | - Residues * | 31152 | 32755 | 2547 | 2690 | 2526 | 2844 | 32489 | -1.4 |
| | - Inventories | 5428 | 5228 | 4621 | 4825 | 5023 | 5475 | 5475 | 0.8 |
| So. Atlantic | - Total Receipts | 23769 | 25736 | 2301 | 2336 | 2464 | 2702 | 27601 | 6.8 |
| | - Total Consumpt | 23725 | 25847 | 2301 | 2319 | 2464 | 2589 | 27407 | 5.4 |
| | - Residues * | 8273 | 7904 | 660 | 684 | 680 | 770 | 8254 | 3.8 |
| | - Inventories | 1165 | 1163 | 1039 | 1045 | 1163 | 1366 | 1366 | 15.8 |
| Northeast | - Total Receipts | 7283 | 7051 | 577 | 615 | 623 | 698 | 7450 | 7.3 |
| | - Total Consumpt | 7221 | 7274 | 542 | 574 | 595 | 670 | 7561 | 4.8 |
| | - Residues * | 1452 | 1189 | 115 | 146 | 133 | 136 | 1474 | 25.8 |
| | - Inventories | 652 | 577 | 422 | 481 | 491 | 531 | 531 | -1.1 |
| South Central | - Total Receipts | 26510 | 28409 | 2535 | 2788 | 2528 | 2627 | 31069 | 5.0 |
| | - Total Consumpt | 27153 | 29152 | 2618 | 2708 | 2483 | 2511 | 30635 | 4.7 |
| | - Residues * | 8616 | 9218 | 757 | 822 | 705 | 821 | 9126 | -2.4 |
| | - Inventories | 1346 | 1536 | 1191 | 1215 | 1186 | 1354 | 1354 | -16.8 |
| North Central | - Total Receipts | 5601 | 6265 | 576 | 632 | 526 | 572 | 6988 | 11.0 |
| | - Total Consumpt | 5706 | 6343 | 523 | 558 | 511 | 543 | 6677 | 5.0 |
| | - Residues * | 1517 | 1822 | 121 | 138 | 116 | 119 | 1518 | -17.4 |
| | - Inventories | 925 | 851 | 817 | 855 | 866 | 883 | 883 | 1.5 |
| West | - Total Receipts | 15356 | 16014 | 1188 | 1270 | 1256 | 1372 | 15985 | -0.6 |
| | - Total Consumpt | 15234 | 16826 | 1208 | 1209 | 1193 | 1332 | 16062 | -4.8 |
| | - Residues * | 11294 | 12612 | 894 | 900 | 892 | 998 | 12118 | -4.1 |
| | - Inventories | 1338 | 1102 | 1152 | 1229 | 1317 | 1341 | 1341 | 10.4 |

* - Consumption of Residues in Cord Equivalents. SOURCE: American Pulpwood Association

## UNITED STATES TRADE WITH CANADA
### IMPORTS FROM CANADA

| | YEAR 1983 Tons | YEAR 1983 $000 | SEPT 1984 Tons | SEPT 1984 $000 | OCT. 1984 Tons | OCT. 1984 $000 | Annual Rate Y-T-D 1984 | % Change From same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| Pulpwood, Roundwood (in cords of 128 cubic feet) | 155124 | 7471 | 18136 | 818 | 23195 | 1185 | 196015 | 76.4 |
| Pulpwood Chips | 1987168 | 48979 | 158729 | 3470 | 119384 | 2654 | 2164482 | 7.8 |
| Wood Pulp, Total | 3755201 | 1363975 | 332935 | 142190 | 327084 | 141843 | 4020732 | 8.7 |
| Waste Fibrous Materials, Total | 157732 | 26491 | 12681 | 2027 | 13638 | 2181 | 158168 | 0.8 |
| Paper, Board & Products,Total | 8274914 | 3372728 | 808620 | 353334 | 800038 | 358137 | 9404677 | 14.6 |
| Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. | 8221322 | 3274062 | 802578 | 343207 | 792769 | 343055 | 9335823 | 14.5 |
| Paper Paperboard & Products | 7846516 | 3277974 | 762046 | 342546 | 749084 | 345004 | 8932269 | 15.2 |
| Paper & Paperboard, Only | 7792924 | 3179310 | 756003 | 332419 | 741816 | 331922 | 8863415 | 15.1 |
| Paper, Total | 7633585 | 3139193 | 739155 | 327375 | 725458 | 326888 | 8645314 | 14.6 |
| Newsprint | 6845135 | 2732234 | 646871 | 276142 | 633524 | 276481 | 7689890 | 13.6 |
| Printing,Writing & Rel.Pap. | 695907 | 348512 | 80734 | 43666 | 78788 | 42353 | 831503 | 21.8 |
| Pack. & Ind. Conv. Paper | 79209 | 46889 | 8865 | 5458 | 8901 | 5028 | 101182 | 26.8 |
| Special Industrial Paper | 2732 | 4473 | 346 | 554 | 235 | 406 | 3342 | 17.0 |
| Tissue Paper | 10602 | 7085 | 2340 | 1554 | 4009 | 2620 | 20396 | 83.9 |
| Paperboard, Total | 159339 | 40117 | 16848 | 5045 | 16358 | 5034 | 218101 | 40.5 |
| Convtd Paper&Paperbd Products | 53592 | 98664 | 6043 | 10126 | 7269 | 13082 | 68854 | 31.5 |
| Wet Machine Board | 3036 | 1916 | 102 | 66 | 183 | 125 | 2151 | -31.2 |
| Construction Paper & Board | 425362 | 92836 | 46472 | 10722 | 50771 | 11008 | 470257 | 4.6 |

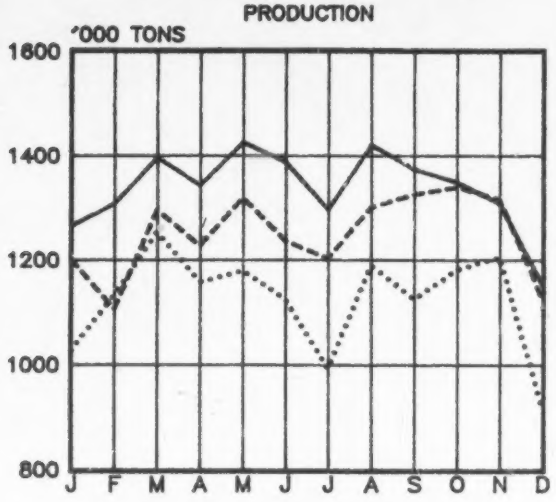
### EXPORTS TO CANADA

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Pulpwood, Roundwood (in cords of 128 cubic feet) | 68965 | 4381 | 8757 | 174 | 11424 | 612 | 84971 | 22.0 |
| Pulpwood Chips | 38246 | 2026 | 1568 | 72 | 2668 | 118 | 30881 | -25.4 |
| Wood Pulp, Total | 133633 | 55369 | 11884 | 5497 | 26856 | 11727 | 181385 | 31.3 |
| Cotton Pulp & Other Pulp | 9567 | 5287 | 874 | 620 | 370 | 211 | 10362 | 6.0 |
| Waste Paper | 346809 | 39478 | 28203 | 3169 | 25138 | 3088 | 335287 | -2.3 |
| Paper, Board & Products,Total | 659229 | 471256 | 47646 | 38328 | 68737 | 48296 | 763483 | 15.2 |
| Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Board | 448117 | 306687 | 36774 | 26461 | 54338 | 33403 | 566641 | 24.1 |
| Paper, Paperboard & Products | 628109 | 459325 | 45783 | 37496 | 66148 | 47127 | 732488 | 16.0 |
| Paper & Paperboard, Only | 416998 | 294756 | 34810 | 25629 | 51749 | 32234 | 535646 | 26.0 |
| Paper, Total | 230771 | 210626 | 17183 | 17658 | 24204 | 22267 | 297125 | 28.5 |
| Newsprint | 4312 | 3805 | 303 | 256 | 280 | 244 | 4792 | 12.1 |
| Printing,Writing & Rel.Pap. | 125110 | 101541 | 9762 | 8890 | 13991 | 12789 | 139730 | 11.4 |
| Pack. & Ind. Conv. Paper | 34403 | 20921 | 2876 | 1987 | 3548 | 2186 | 45216 | 39.1 |
| Special Industrial Paper | 63390 | 81389 | 3979 | 6159 | 5664 | 6584 | 103840 | 59.5 |
| Tissue | 3556 | 2969 | 263 | 365 | 720 | 465 | 3546 | -10.1 |
| Paperboard, Total | 186226 | 84131 | 17728 | 7972 | 27545 | 9867 | 238521 | 23.1 |
| Convtd Paper&Paperbd Products | 211112 | 184569 | 10872 | 11887 | 14399 | 14893 | 196842 | -4.5 |
| Wet Machine Board | 5288 | 2976 | 309 | 224 | 475 | 298 | 5261 | -1.2 |
| Construction Pap & Bd. E | 25831 | 8955 | 1554 | 608 | 2114 | 871 | 25733 | -2.3 |

SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

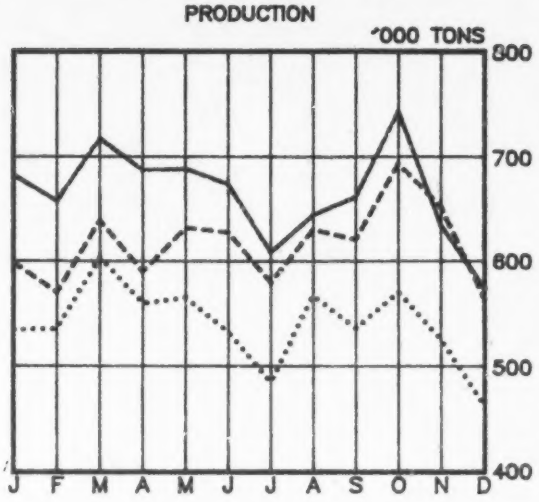
## UNBLEACHED KRAFT LINERBOARD

PRODUCTION



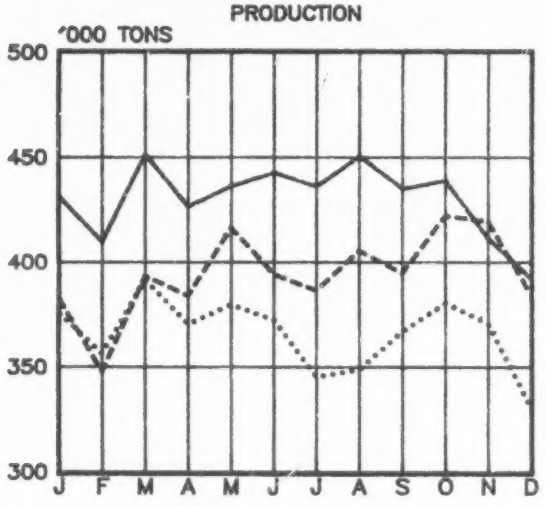

## RECYCLED PAPERBOARD

PRODUCTION



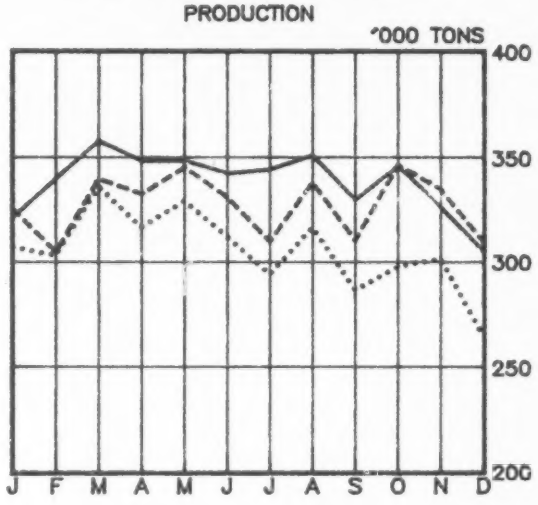

## SEMICHEMICAL PAPERBOARD

PRODUCTION



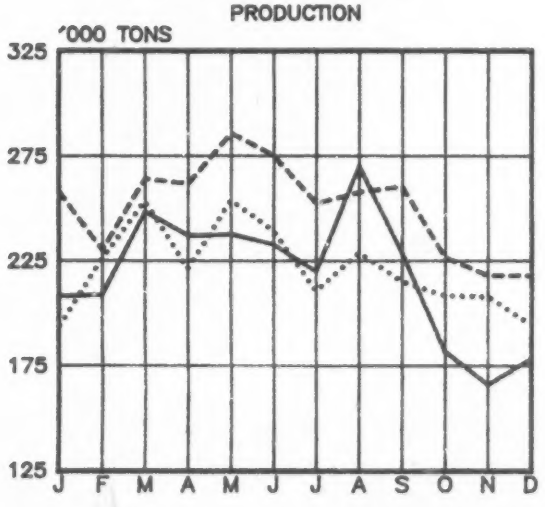

## SOLID BLEACHED PAPERBOARD

PRODUCTION



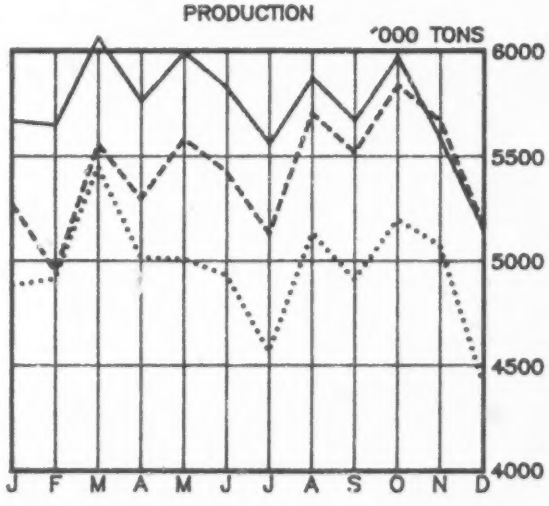

## PAPERBOARD FOR EXPORT

PRODUCTION




## TOTAL PAPER AND PAPERBOARD

PRODUCTION




1982 ····· 1983 - - - - - 1984 ———

# PULP PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

## I M P O R T S

| | YEAR 1983 Tons | YEAR 1983 $000 | OCT. 1984 Tons | OCT. 1984 $000 | NOV. 1984 Tons | NOV. 1984 $000 | (1) Annual Rate Y-T-D 1984 | % Change From same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| Pulpwood Roundwood (cords) | 155124 | 7471 | 23195 | 1195 | 32071 | 1706 | 213253 | 88.8 |
| Pulpwood Chips | 1991453 | 49104 | 118458 | 2656 | 128666 | 2805 | 2108815 | 3.5 |
| Total All Imports | 13248280 | 5526141 | 1279083 | 606688 | 1376914 | 648792 | 15785726 | 18.4 |
| Wood Pulp Total | 4093436 | 1472478 | 343694 | 149135 | 415238 | 173175 | 4444802 | 8.7 |
| Waste Paper | 100410 | 10537 | 9656 | 1042 | 8747 | 884 | 110659 | 8.5 |
| Other Fibrous Materials | 68003 | 24272 | 5726 | 1816 | 3659 | 1325 | 67467 | -0.4 |
| Paper Board & Products Total | 8986431 | 4018855 | 920006 | 454695 | 949271 | 473408 | 11162798 | 24.8 |
| Paper Paperboard Wet Machine Bd. & Construction Paper & Board | 8834580 | 3582292 | 900840 | 407733 | 927800 | 425943 | 10940251 | 24.2 |
| Paper Pbd & Prds ex Cnst&WMB | 8509180 | 3911591 | 864302 | 442317 | 908869 | 464135 | 10645734 | 25.8 |
| Paper & Paperboard Only | 8357309 | 3475028 | 845136 | 395355 | 887198 | 416671 | 10423187 | 25.4 |
| Paper Total | 8180491 | 3428868 | 827072 | 389222 | 870005 | 410757 | 10179641 | 24.8 |
| Newsprint | 6818348 | 2757524 | 648505 | 281538 | 664250 | 287917 | 7916363 | 14.7 |
| Printing & Writing | 1151011 | 587426 | 162721 | 86826 | 189491 | 111968 | 2085002 | 85.2 |
| Uncoated Groundwood | 732237 | 331017 | 81415 | 43279 | 111583 | 59132 | 1113281 | 52.2 |
| Uncoated Book | 154147 | 88632 | 30908 | 17490 | 20629 | 12018 | 262490 | 76.2 |
| Coated Print.& Impress. Par | 162441 | 101289 | 37813 | 27185 | 42567 | 30802 | 426538 | 175.9 |
| Bristols | 471 | 557 | 43 | 45 | 44 | 34 | 650 | 68.1 |
| Writing and Similar Paper | 81458 | 46718 | 10569 | 6825 | 13015 | 8066 | 233768 | 224.6 |
| Thin (except Cigarette) | 20258 | 19213 | 1872 | 1893 | 1654 | 1916 | 48294 | 183.3 |
| Total Pkg & Other Paper | 107515 | 75684 | 11024 | 7638 | 12842 | 8656 | 145089 | 37.4 |
| Unbleached Kraft Paper | 42013 | 17454 | 2651 | 1187 | 3841 | 1790 | 44878 | 4.8 |
| Other Pkg. & Indust. Paper | 65503 | 58240 | 8373 | 6452 | 9001 | 6866 | 104211 | 58.5 |
| Tissue | 11617 | 8225 | 4822 | 3218 | 3422 | 2217 | 28187 | 153.5 |
| Paperboard, Total | 167818 | 46160 | 18064 | 6133 | 17193 | 5913 | 243548 | 46.5 |
| Test or Containerboard | 48119 | 13042 | 5599 | 1906 | 5896 | 2130 | 70686 | 48.3 |
| Semi-Chemical Corrugating | 68564 | 14509 | 6594 | 1696 | 5853 | 1558 | 101589 | 47.3 |
| Other Paperboard | 50136 | 18609 | 5871 | 2532 | 5444 | 2224 | 71262 | 42.6 |
| Convtd Paper&Paperbd Products | 151872 | 436583 | 19166 | 46962 | 21471 | 47465 | 222547 | 49.1 |
| Paper Products, Total | 124816 | 373866 | 16043 | 41687 | 18377 | 42322 | 187400 | 53.3 |
| Paperboard Products, Total | 27055 | 62597 | 3123 | 5276 | 3094 | 5143 | 35147 | 30.0 |
| Wet machine Board | 3584 | 2422 | 203 | 138 | 313 | 217 | 2980 | -16.6 |
| Construction Paper & Board | 473667 | 104842 | 55501 | 12238 | 40288 | 9055 | 514083 | 4.7 |
| Notes | | | | | | | | |
| Other: No Weight Avail. ($000) | | 148251 | | 17275 | | 17583 | 198887 | 34.7 |
| Total Imports Incl. Other($000) | | 5674392 | | 623964 | | 666375 | 7421798 | 31.5 |

## E X P O R T S

| | | | | | | | (1) | |
|---|---|---|---|---|---|---|---|---|
| Pulpwood, Roundwood (cords) | 69487 | 4405 | 11424 | 612 | 12781 | 732 | 81543 | 30.9 |
| Pulpwood Chips | 2554176 | 171289 | 137426 | 10588 | 190059 | 14750 | 2320557 | -10.6 |
| Total All Exports | 10888949 | 4221511 | 943242 | 377718 | 855157 | 349747 | 11361814 | 5.1 |
| Wood Pulp,Total | 3643863 | 1362022 | 283879 | 123035 | 273980 | 117138 | 3580585 | 0.7 |
| Cotton Pulp and Other Pulp | 102863 | 68805 | 4840 | 4274 | 5350 | 4246 | 83074 | -18.3 |
| Waste and Old Paper | 2573716 | 308815 | 285060 | 35659 | 272211 | 33122 | 3247924 | 26.8 |
| Paper, Board & Products,Total | 4568407 | 2480769 | 358463 | 214751 | 303616 | 185241 | 4450250 | -3.1 |
| Paper Paperboard,Wet Machine Bd. & Construction Paper & Board | 3984277 | 1717768 | 311713 | 150122 | 260571 | 133455 | 3872305 | -3.4 |
| Paper, Pbd & Prod ex Cnst&WMB | 4501039 | 2448779 | 353454 | 211234 | 296948 | 182560 | 4372172 | -3.4 |
| Paper & Paperboard, Only | 3816910 | 1685778 | 305705 | 146604 | 255903 | 130774 | 3794227 | -3.7 |
| Paper, Total | 773414 | 599370 | 83393 | 53767 | 84173 | 55184 | 807530 | 3.4 |
| Newsprint | 294870 | 127119 | 24442 | 11028 | 29331 | 12750 | 310942 | 5.0 |
| Printing & Writing | 201798 | 198304 | 18789 | 22249 | 15934 | 18894 | 204124 | 0.1 |
| Uncoated Groundwood | 37289 | 33300 | 3288 | 3114 | 2241 | 2186 | 30015 | -21.7 |
| Clay Coated Paper | 79182 | 60033 | 7720 | 8685 | 6158 | 5439 | 88439 | 8.3 |
| Uncoated Free Sheet | 59125 | 71662 | 8458 | 8805 | 5856 | 8478 | 85452 | 8.8 |
| Other Printing & Writing | 26202 | 33310 | 2312 | 3645 | 1679 | 2890 | 22217 | -17.3 |
| Total Pkg. & Other Paper | 260865 | 255086 | 17701 | 19029 | 17648 | 22126 | 275221 | 4.2 |
| Unbleached Kraft | 116170 | 43227 | 8209 | 2838 | 8463 | 2815 | 106321 | -8.9 |
| Other Pkg. & Indust. Paper | 144695 | 211859 | 11492 | 16189 | 11184 | 19311 | 168900 | 15.5 |
| Tissue | 15881 | 18861 | 1460 | 1460 | 1260 | 1315 | 17243 | 5.1 |
| Paperboard, Total | 3143486 | 1086408 | 242313 | 82837 | 191730 | 75590 | 2886687 | -5.5 |
| Solid Wood Pulp | 2893868 | 1016184 | 221515 | 85543 | 176468 | 70302 | 2821620 | -6.2 |
| Total Linerboard | 2254538 | 575862 | 173165 | 56529 | 122871 | 39051 | 2101012 | -7.7 |
| Bleached Kraft Linerboard | 160253 | 64914 | 15747 | 6478 | 10087 | 4154 | 134098 | -14.9 |
| Unbleached Kraft Linerbd | 2094285 | 510848 | 157418 | 50050 | 112804 | 34897 | 1966914 | -7.2 |
| Other Unbleached Kraft | 107141 | 51822 | 5007 | 2772 | 6380 | 2986 | 116386 | 17.8 |
| Other Bleached Kraft | 558431 | 371357 | 40489 | 25348 | 44307 | 27150 | 566048 | 1.0 |
| Semi-Chemical Corrugating | 73758 | 17144 | 2854 | 894 | 2910 | 1114 | 38183 | -47.6 |
| Recycled Paperboard | 148628 | 70224 | 20797 | 7294 | 15262 | 5288 | 165077 | 7.8 |
| Convtd Paper&Paperbd Products | 584128 | 763001 | 47748 | 64630 | 43045 | 61786 | 577845 | -0.9 |
| Paper Products, Total | 311722 | 535596 | 21672 | 41822 | 20118 | 42127 | 282688 | -6.2 |
| Paperboard Products, Total | 272408 | 227406 | 26077 | 22707 | 22927 | 19658 | 285260 | 5.2 |
| Wet Machine Board | 11822 | 5420 | 1072 | 548 | 830 | 486 | 13470 | 18.1 |
| Construction Paper & Board E | 55746 | 28570 | 4937 | 2872 | 3738 | 2185 | 64808 | 17.8 |
| Notes | | | | | | | | |
| Other: No Weight Avail. ($000) | | 7965 | | 579 | | 745 | 8924 | 11.6 |
| Total Exports Incl. Other($000) | | 4229475 | | 378397 | | 350492 | 4555550 | 8.3 |

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Incl. estim. of tonnage based on square foot data.
(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES
1967 = 100

| | 1982 | 1983 | SEPT | OCT. | NOV. | DEC. | Annual Rate Y-T-D 83 | % Change From same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| Pulp, Paper and Products except Building Grades | 273.2 | 271.4 | 287.2 | 288.3 | 288.4 | 288.4 | 282.5 | 7.5 |
| Pulp Paper & Products, ex. Building Grades & ex Waste Paper # | 275.8 | 273.3 | 296.0 | 295.4 | 304.5 | 300.0 | 294.2 | 7.7 |
| Total Wood Pulp | 378.1 | 347.1 | 408.5 | 396.5 | 388.4 | 352.7 | 355.0 | 13.8 |
| Total Paper | 286.3 | 282.3 | 306.7 | 308.0 | 308.2 | 307.1 | 303.2 | 7.4 |
| Total Paper, exc. Newsprint | 278.3 | 277.0 | 303.8 | 303.1 | 303.6 | 302.2 | 301.2 | 8.7 |
| Newsprint | 315.8 | 303.0 | 331.2 | 338.2 | 336.9 | 336.8 | 324.1 | 7.0 |
| Total Paperboard | 254.9 | 250.8 | 288.2 | 291.8 | 293.4 | 292.4 | 280.6 | 11.9 |
| Total Paper and Paperboard # | 276.5 | 272.4 | 300.9 | 302.9 | 303.6 | 302.5 | 296.1 | 8.7 |
| Converted Products | 264.4 | 265.4 | 283.8 | 285.8 | 286.1 | 288.0 | 280.7 | 5.6 |
| Waste Paper | 121.1 | 158.6 | 249.6 | 235.6 | 221.4 | 206.0 | 240.1 | 51.4 |
| All Commodities | 299.3 | 303.1 | 308.5 | 309.4 | 310.4 | 309.9 | 310.4 | 2.4 |
| Industrial Commodities | 312.3 | 315.7 | 322.3 | 323.2 | 323.6 | 323.0 | 322.6 | 2.2 |

SOURCE: Producer Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor # Computed by API



Continued from Page 2

Production of recycled boxboard for domestic use in 1984 rose 11%, bringing the total to its highest level since 1973. Total production of folding boxboard (including exports) rose by about 9%, also marking a new high.

Production of recycled paperboard did very well in 1984. At 8 million tons, the total was 7.7% above that of 1983, and 1% above the previous high established back in 1973. In the intervening period, aside from the recession years of 1975 and 1982, total recycled paperboard production fluctuated in the narrow range of 7.0 - 7.6 million tons.

Among the other recycled paperboard grades, production of tube, can and drum stock was about 8% above its year-earlier high, while the production of gypsum wallboard facings -- used largely in residential construction and in maintenance and repair of residential homes -- gained 17%. However, in the late months of 1984 production of this grade moved below the rate of the earlier months of the year, reflecting the decline in the construction of new homes.

## IMPORTS AND EXPORTS

The strong U.S. dollar continues to take its toll on the paper and paperboard industry and total exports of paper and paperboard have been following a downward trend. The November 1984 paper plus paperboard exports, as reported by the Department of Commerce, amounted to 256,000 tons, about 26% below its year-ago level. For the entire January-November period, exports of paper and paperboard were at the rate of 3.8 million tons per year, 3.7% below the comparable 1983 total.

Continued on Page 11

Continued from Page 10

The strong dollar, combined with strong demand for the products of the paper and paperboard industry resulted in major gains in imports in 1984. The November 1984 imports of paper plus paperboard amounted to 887,000 tons, of 928,000 tons was 10% over its year-earlier level. For the entire 11-month 1984 period, imports were up 25%, at a rate of 10.4 million tons per year.

Imports of paper have long been dominated by newsprint; in the first 11 months of 1984 newsprint imports averaged 7.9 million tons per year, 15% above their year-earlier rate. If imports hold at this rate in December, the 1984 total would be 7% above the previous high established in 1974.

In recent years imports of printing and writing papers have been showing steep growth trends. Total imports of these grades in the January-November 1984 period, at 2.1 million tons per year, were 85% above their year-earlier level. The major component of these imports was uncoated groundwood papers. Their January-November 1984 rate was 1.1 million tons per year, 52% above its year-ago level. These imports amounted to 45% of the total new supply, indicating that groundwood papers, like newsprint, should rightly be considered as a North American rather than a mainly United States product.

The strong demand for coated papers was reflected in the 176% gain in coated paper imports evident in the first 11 months of 1984. The API's November 1984 Capacity Survey indicates that total coated paper capacity in 1985 will be 2.9% above that ot 1984, and that it will increase by 3.5% in 1986 and 7.5% in 1987.

Uncoated free sheet paper imports have also shown major gains in 1984, rising by 125% from their 11-month 1983 level. At 496,000 tons per year, these imports amounted to 5% of the total new supply.

FIBROUS MATERIALS

Production of wood pulp has pretty well followed the trend of paper and paperboard production. Total wood pulp production in 1984 increased by an estimated 5%, while output of market wood pulp rose by 5.5%. Imports of paper grade wood pulp increased 8% while exports showed only a 2% gain.

Inventories of chemical paper grade market pulp at wood pulp mills rose sharply from September to November, then leveled off in December. The year-end 1984 level was 591,000 short tons, up 54% from December 1983. The other major market pulp producing countries also increased their inventories of market pulp. For example, inventories of market wood pulp in Canada at the end of 1984 were 28% above their year-ago level, while those of the Scandinavian countries showed a 27% gain.

Use of waste paper in the production of paper and paperboard gained in importance in 1984. Total consumption, at nearly 16 million tons per year, rose by 8%, compared to a 7% increase in consumption of wood pulp at paper and paperboard mills.

Continued on Page 12

Continued from Page 11

## CAPITAL EXPENDITURES

The most recent report by the Department of Commerce on new plant and equipment expenditures indicates that paper and allied product companies sharply increased the rate of expenditures in the last half of 1984, and that they will further increase such expenditures in 1985.

The report shows that where companies classified in the paper industry were spending $7.0 billion per year on new plant and equipment during the first half of 1984, they spent $7.72 billion per year in the third quarter and $8 billion per year in the final quarter. This brought the 1984 total to a record-high $7.42 billin, 20% above the $6.18 billion spent in 1983.

The report also shows that paper and allied products companies plan to increase their expenditures even further during the first half of 1985, pushing the rate to $8.81 billion per year in the first quarter and an astonishing $9.14 billion in the second quarter. These sharp increases in dollar outlays do not reconcile with the results of API's Capacity Survey.

Recent studies by the American Paper Institute indicate that expenditures for new plant and equipment at new and existing paper and allied products establishments are now probably close to $6 billion per year. API's recent Capacity Survey showed that paper, paperboard and construction paper and board producers planned to increase their capacity by only 1.2% in 1985, 1.7% in 1986 and another 1.7% in 1987. Even allowing for some increase in prices of new plant and equipment and in outlays for modernization and replacement, these planned increases do not seem to be consistent with the steep expenditure increases published by Commerce.

The Commerce data, which refer to expenditures by companies classified in paper and allied products, include several large companies that are converters in the industry, but would also have significant facilities outside the industry. This would overstate investments in the paper industry. But it is also true that these classification differences make it difficult to interpret the figures reported by the Department of Commerce.